

Trail Planning??

2003.10.30



Trail Planning

Holli McClain
Bureau of Land Management
Eastern Interior Field Office, Alaska
Outdoor Recreation Planner

John Favro
U.S. Forest Service
Northern Region Trails Coordinator (Retired)



Module Objectives

At the end of this module, you will be able to:

- Demonstrate familiarity with the trail planning flowchart
- Learn to plan trails that meet the expectations of users and that protect resources, while meeting agency and law requirements



Trail Planning

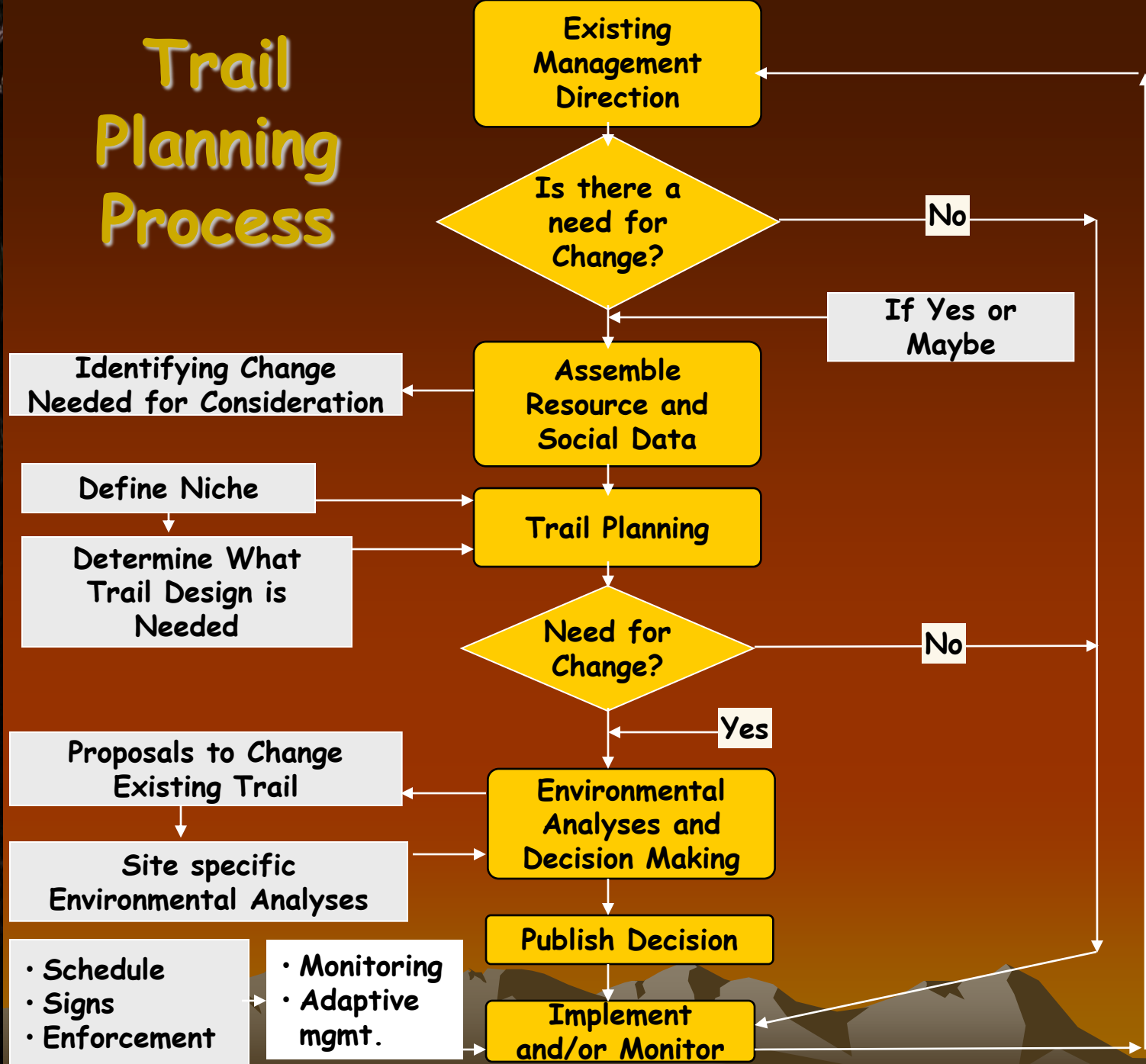
- How we get from the current situation to a trail that meets our desired condition.
- Advice from the Route and Area Designation Guide:
 - Avoid unnecessary analysis
 - Focus on the change from the status quo
 - Collaborate



Steps in Project Preparation

- Ideally, the full trail planning process should take 5 years
- 3 years is more realistic and should be considered the minimum
- Trail planning involves lots of folks
- Trail planning should be the same for either contract or force account

Trail Planning Process




First Goal for First Year of Planning: Compile Existing Management Direction

Collect all management direction for the trail. Obtain information from:

- Laws, Management Strategies, Guidance
- Management plans, general plans, activity plans, travel management plans, transportation plans, masterplans, recreation area management Plans

continued...

- 
- Inventory of existing facilities
 - Trail Management Objective (TMO) - Set TMOs if not set by this time
 - Project plans, design guidelines, trail standards
 - Does your agency own the land or have an easement, is there broken land ownership you would have to deal with?

...And, most important!!!

Is there a need for change?



Trail Laws

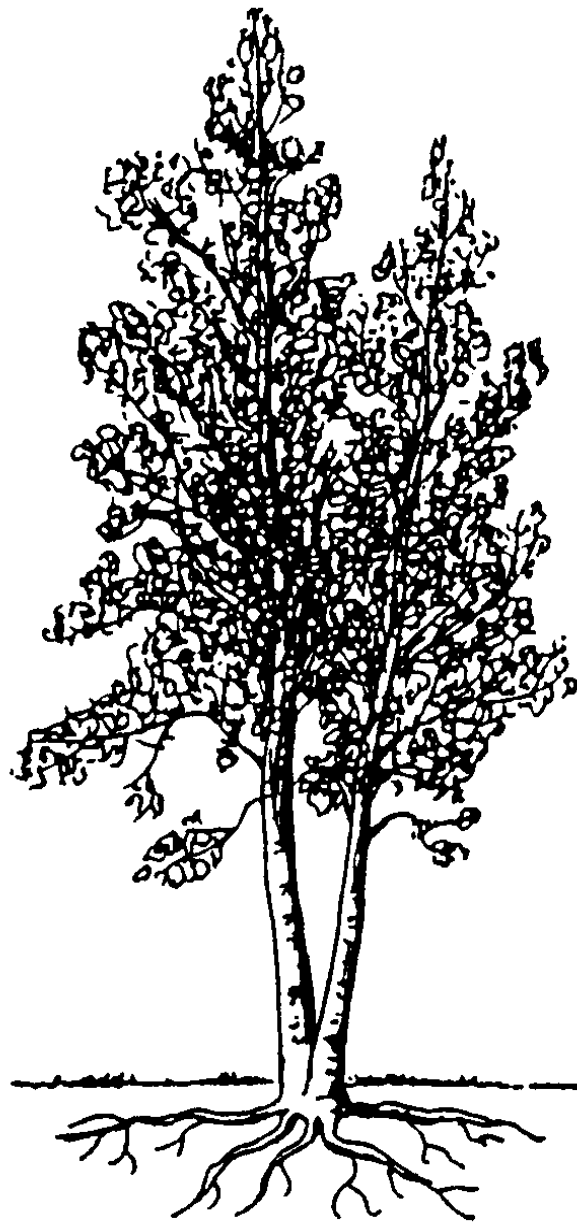
Always Consider
the Law



Agreements
Or
Contracts

Rules &
Regulations

Laws



Policy - Manuals
& Directives

Executive Orders

Courts

Constitution

We the People

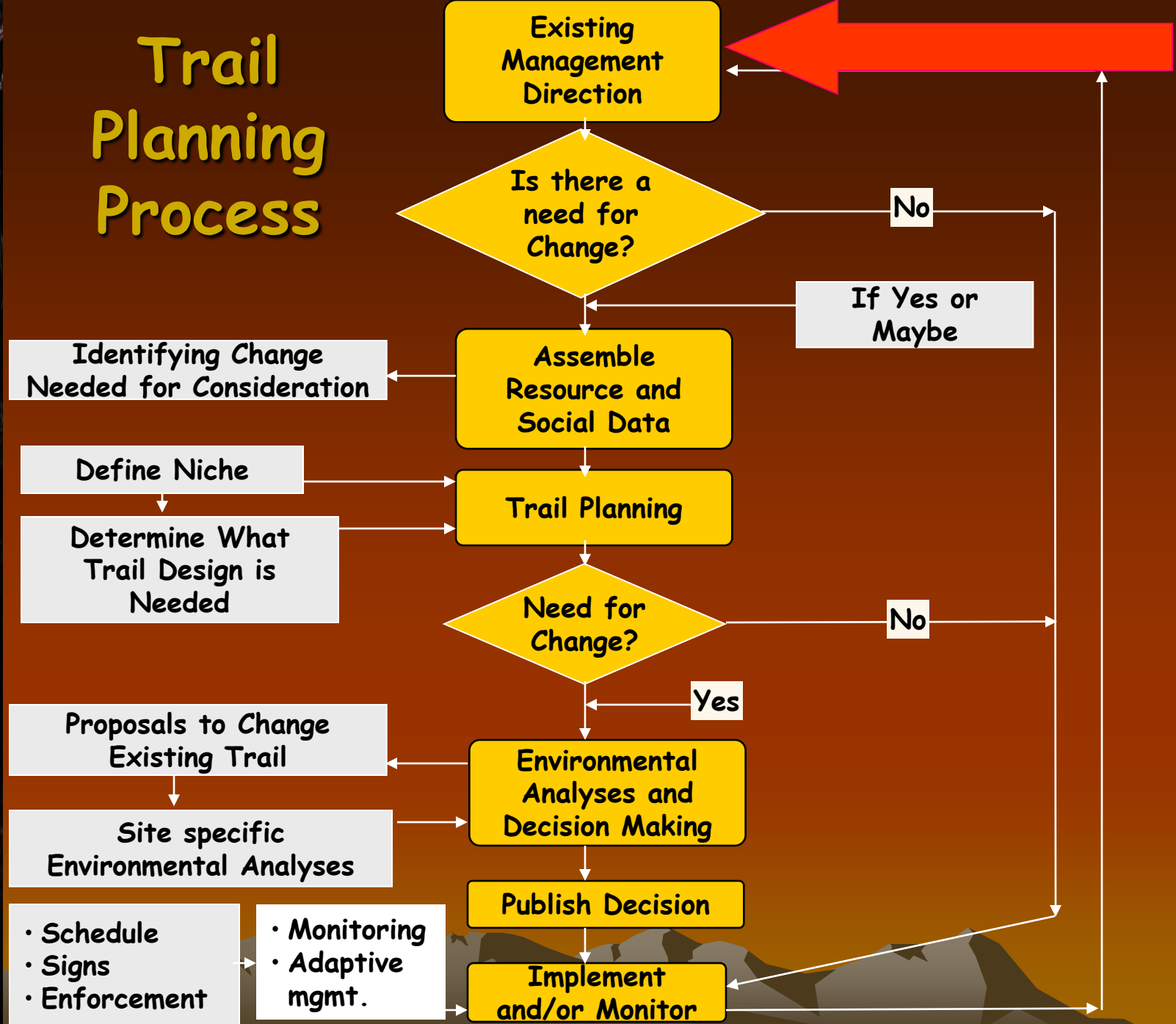
Article 1

The United States Constitution!!

Article IV Section 3

- "The Congress shall have Power to dispose of and make all needful Rules and Regulations respecting the Territory or other Property belonging to the United States;..."

Trail Planning Process



Inventory and Assessment of Relevant Resources



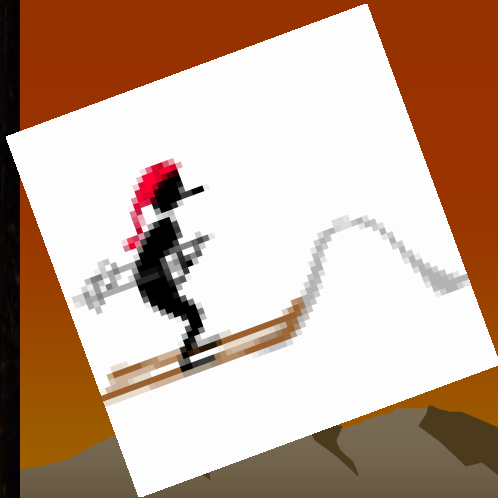
- Literature search - what information is out there regarding the trail?
- Resource information from Management Plans
- ROS

Second Goal for First Year of Planning: Assemble Resource and Social Data

- Understand desired user experiences (needs) now and in the future...Who are your customers?
- Determine Landscape Characteristics
- Determine Social Characteristics
- Field recon with appropriate folks such as archeologist, biologists, etc
- Is there a need for change?



Who Are Our Customers?



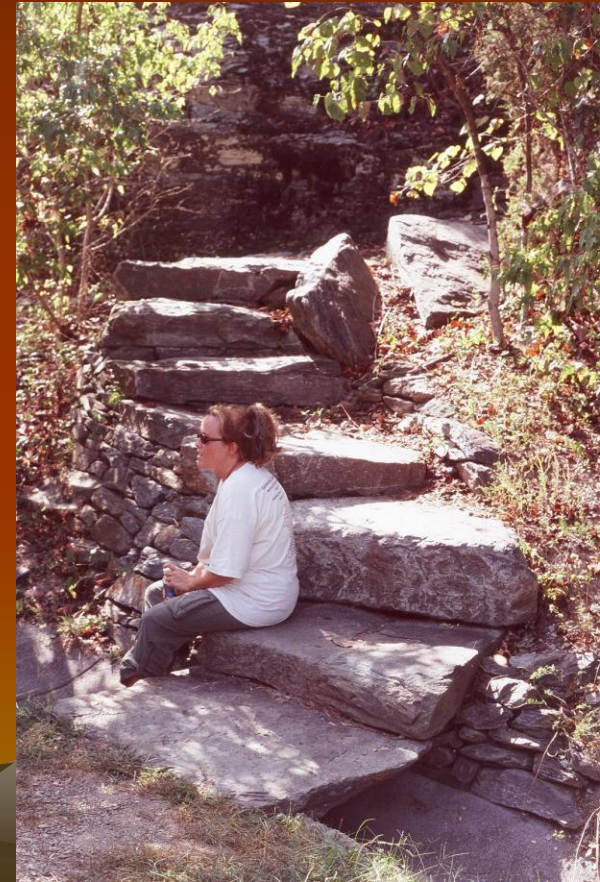
Who Are Our Customers?

Hikers, Backpackers, Adjacent Land Owners, Citizens of the US, Foreign Visitors, Special Interest Groups, Other Resource Staff, etc.



Identifying Customers

- WHO are the individuals/groups
- WHAT trail features impact them
- HOW are they impacted
- WHEN to involve them
- WHERE to meet them



Recreation Opportunity Spectrum

Provides a framework for stratifying and defining classes of outdoor recreation, environments, and experience opportunities. These are divided into six classes:

1. Primitive
2. Semi-Primitive Non-Motorized
3. Semi-Primitive Motorized
4. Roaded Natural
5. Urban



Opportunities for experiences along the spectrum represent a range from...

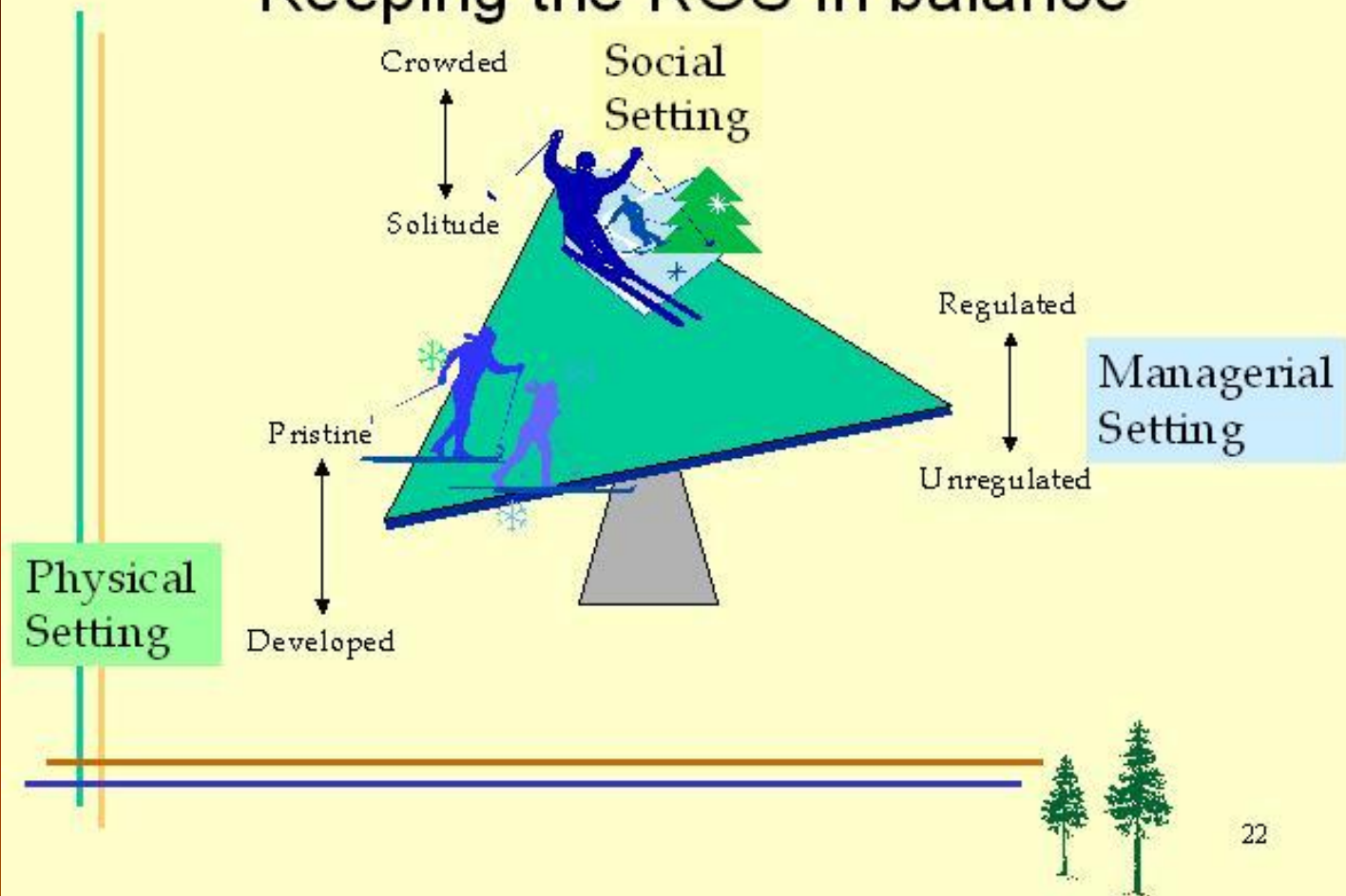
A high probability of solitude, self reliance, challenge, and risk:

To...



A very social experience where self reliance, challenge, and risk are relatively unimportant.

Keeping the ROS in balance



As you assemble resource data,
complete an inventory and
assessment of relevant resources
which should consist of:

Existing conditions of soil,
water flow, vegetation,
wildlife, cultural resources,
caves, etc.

Use GIS data for trail if
available



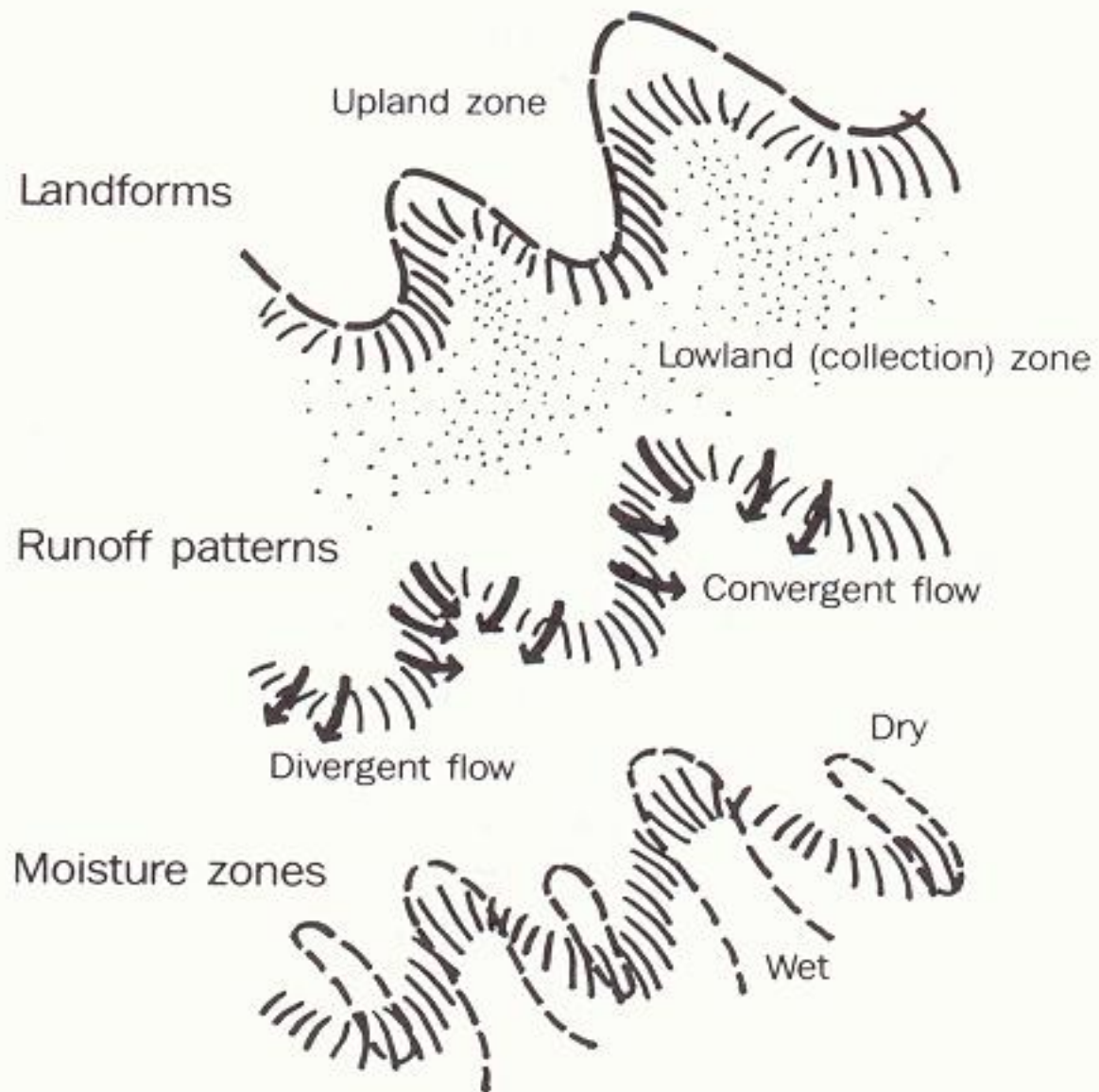


Fig. 9.10 Concave and convex edges and associated runoff patterns.



View-shed



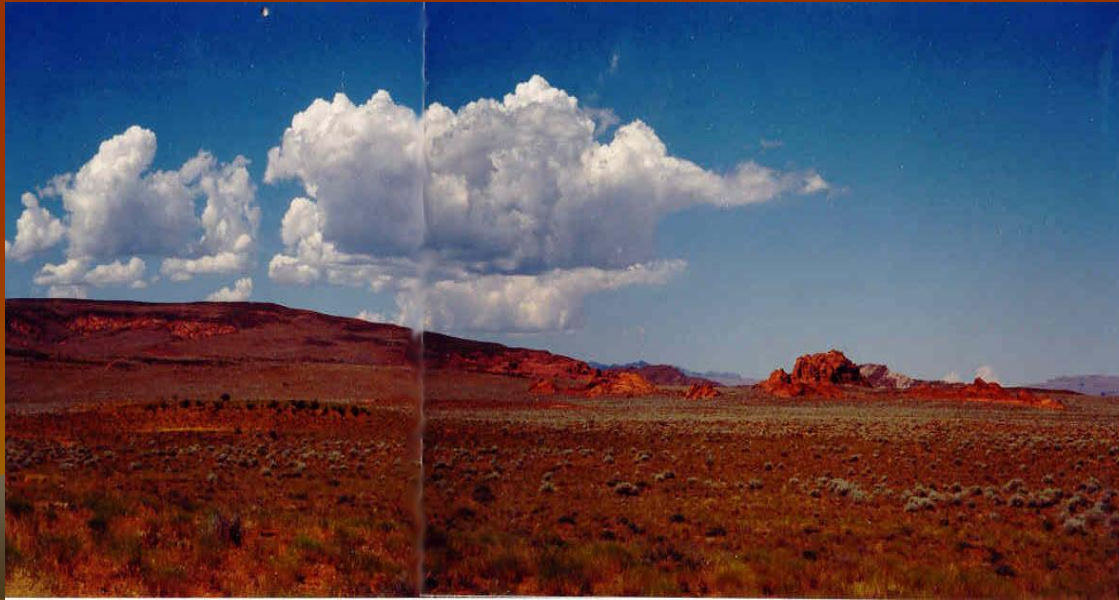
FRAGILE SOILS AND ENDANGERED PLANTS



RIPARIAN ZONES AND ENDANGERED FISH OR PLANT HABITAT



Unique Features



Wildlife Habitat and Threatened Species



PRE-HISTORIC ARTIFACTS





Inventory and Assessment of Social Characteristics

- Complete a resource inventory and assessment for social characteristics:
 - Physical attributes of any existing trails (easy or hard for users)
 - Other local recreation opportunities including facilities for services such as fuel and food

continued...



- 
- Is the trail providing the desired experience?
 - Safety concerns
 - Accessibility considerations
 - Identify the area niche
 - Identify the demographics of users
 - Meet with interest groups to obtain current social situation
 - Determine current and future user trends
- 



To Succeed in Trail Planning, You Should Reach Consensus With Interested Parties



What is Consensus?

A Decision Making Tool - where . . .
Everyone participates and
Everyone supports the outcome

It is not . . .
A Majority Vote



Why Consensus?

- Ensures support by diverse groups
- Promotes participation and cooperation in your project
- Reduces resistance and problems



Six Steps

1. Describe and define the problem
2. Brainstorm concerns with all customers
3. Review, change, consolidate, rewrite, priorities
4. Make a decision by consensus
5. Implement
6. Evaluate



Getting to Consensus

Basic Ground Rules

- Hear from & listen to everyone
- Look for innovative, acceptable alternatives
- Do not change simply to avoid conflict, to reach agreement, or maintain harmony
- Avoid voting, averaging, coin toss, or bargaining
- Seek & value differences of opinion

Define the Niche For Your Area





Begin The Process!



- Decide on the planning process you will use and the framework the plan will use
- Gather agency personnel, specialists, customers and interest groups together under a collaborative process to determine options

Identify the issues

- Specifically identify the problem(s) or need(s) that are to be solved or addressed through this planning effort
- What kind of trail is appropriate?
- What will the trail management objective and trail classification be?





Consider Management of the Trail Following Project Completion



- Current Staffing
 - what are the available human resources to implement the plan upon completion?

Trail Planning Process



Developing Alternatives for A Project

- Use all data collected in your resource and social assessments
- Consider legal side boards or decision space determined from your compilation of management direction, resource data and social data collected
- Involve all user and interest groups in alternative development and communicate decision space and sideboards
- Collaborate to obtain consensus



Determine Preliminary Scope of the Project

- Beginning and end of project
- Broad work goals, sufficient to estimate funding needs
- Line Officer or Administrator buy-off
- Schedule year for work to begin



End of Year 1

- Preliminary scope approved by Line Officer or Administrator
- Enter project into funding stream
 - Project funding
 - Partnerships
 - Grants
 - Volunteer programs



Montana Conservation Corps



Goals for Second Year



- Continue to build consensus for your project
- Complete public involvement
- Get clearances from specialists
- Complete NEPA documents and issue decision
- Anything else that helps to set the final scope of project

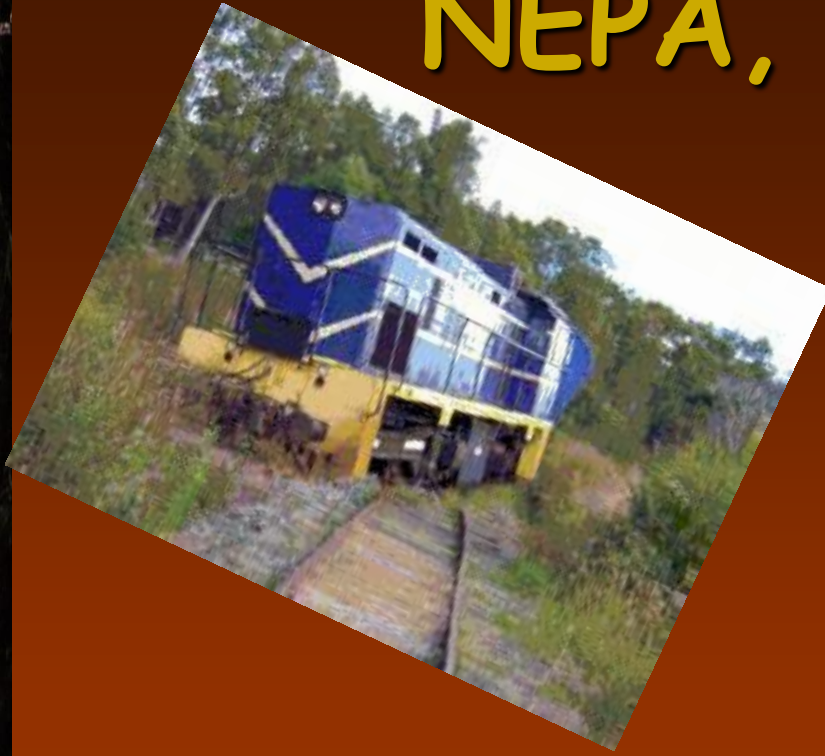
What Does NEPA Stand For?

National
Environmental
Policy
Act

Of 1969



NEPA, Why?



- To provide full disclosure to the public
- Analyze actions and alternatives
- Make informed decisions
- Analyze proposed action to see if impacts to the environment are significant

NEPA is a Public Process

- NEPA applies to federal activities affecting the human and physical environment
- NEPA procedures ensure that public officials and citizens have access to environmental information before decisions are made



What Types of Proposals Trigger NEPA?

- NEPA process must be done for every federal action affecting the human and physical environment unless that activity is allowed under law or by exclusion from environmental analysis through agency procedures and policies
- Each agency was required by NEPA to develop procedures for environmental documents to supplement the regulations as described in the code of federal regulations

Examples for Trails

When is an Environmental Document Required?



- Trail maintenance (usually categorically excluded by agency)
- Trail Reconstruction
- Trail Construction
- Changing Use Type

Determining Whether and When to Initiate the NEPA Process

- Do not jump into the NEPA process until you have a specific proposal
- Make an informal analysis of the project before conducting NEPA analysis to identify whether changes in current decisions are needed

Interdisciplinary Teams



- NEPA requires an interdisciplinary process
- Makeup of the interdisciplinary team will depend on specific issues involved



NEPA Process

- Determine the scope of the project
- Do public scoping
- Determine if NEPA is required and if yes, what level (EA or EIS) Categorical Exclusion (CE)
- Prepare NEPA document and Finding of No Significant Impact (FONSI) (for an EA) or Record of Decision (ROD) for an EIS, or a decision record (DR) for a CE



NEPA Process (continued)

- Follow agency policy for publishing the decision document (who, what, how long)
- Follow agency policy for appeal period and process
- Follow agency policy for appeal resolution
- Implement project

Goal for Third Year

- Complete final field survey and design
- Complete any permitting such as streamside permits or material removal permits
- Put contract needs into advanced acquisition plan or...
- Program force account work, determine needs



End of Third Year

- Get trail maintenance, construction or reconstruction package approvals from line officer
- Make preparations for project work
- Shelve project if not funded





Year 3+: Build Your Trail or Establish Your Trail System Designations



Be sure to continue To monitor the impacts to your trail and to see if it is still meeting the users needs

Trail Management Process: Monitoring



Why Do Monitoring?

- Determine if a trail meets the needs of users
- Ensure trail meets construction standards
 - Interagency Trail Data Standards -
<http://www.nps.gov/gis/trails/index.html>
 - National Trails Classification System Federal Register 3 July 2006
- Develop business plans & proposals

Monitor to...

Determine if a trail meets the needs of the users - you need to know:

- Who was the trail designed for?
- Who is using your trail?
- Who is not using your trail and Why?



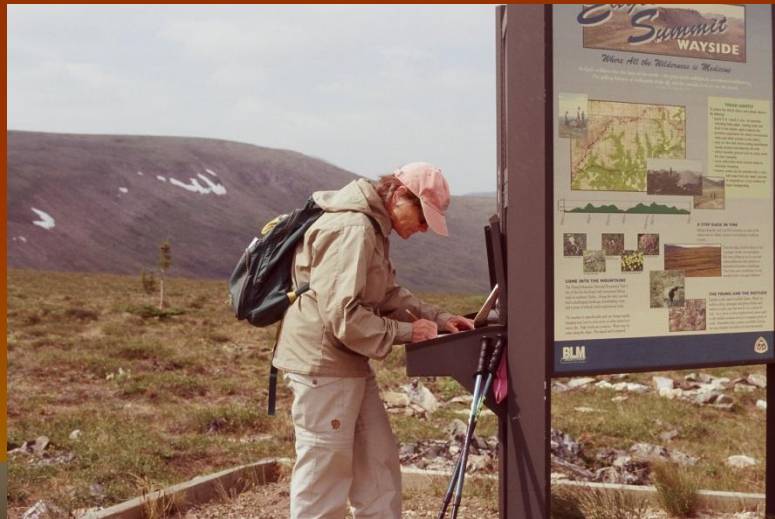
Monitoring Questions To Ask People

- How long were you on the trail?
- How would you describe the trail?
- Would you recommend the trail to others?
- How did you find out about the trail?



Tools

- Visitor registers
- Traffic Counters
- Permits
- Surveys / direct observations



Data Collection Techniques

- GPS with data dictionary
- Inventory forms
- Universal Trail Assessment Process (UTAP)
- Photo Points
- Transects



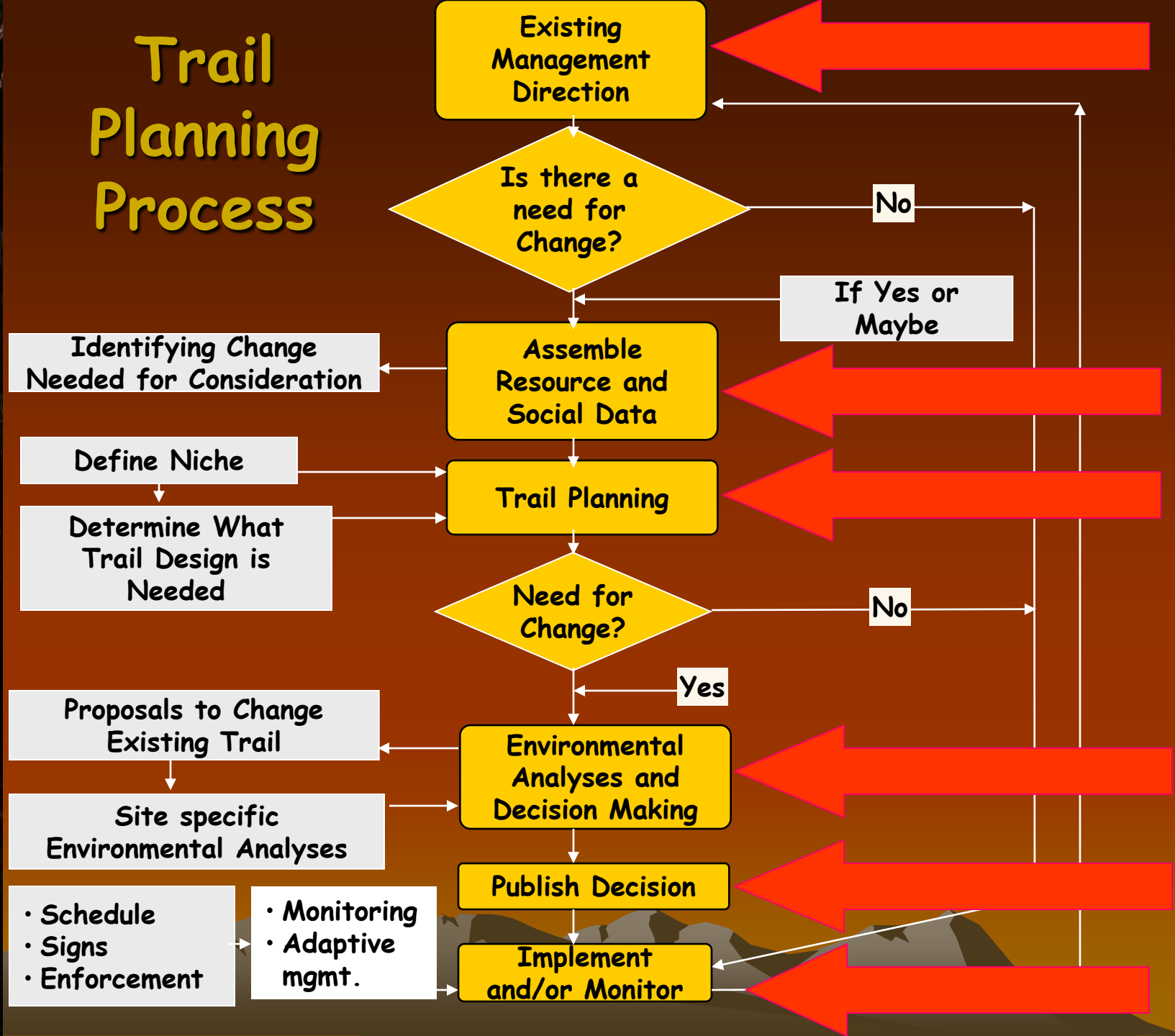
Keep in Mind When Monitoring

- The displaced user
- Who will be doing your monitoring/data collection
- How often will you monitor

Monitor for...

- Other resource values
 - Threatened and endangered species
 - Importation of noxious weeds invasive plants
 - Water quality
 - Impacts to wildlife and fisheries
 - Air pollution / air quality
 - Cultural / historical





For more information on NEPA, go to:
<http://ceq.hss.doe.gov/nepa/nepanet.htm>
<http://www.eh.doe.gov/nepa/>
<http://www.whitehouse.gov/ceq/>

For More Information on trail planning issues go to:

<http://www.fs.fed.us/r3/measures/TR.htm>
<http://www.fs.fed.us/recreation/programs/ohv/>

